COSTA RICA

MARKET PROFILE

FOREST PRODUCTS SOUTH CAROLINA

South Carolina Forestry Commission

CONTENTS

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Prepared by
Edgar Arias
Marketing Specialist
Forest Products South Carolina
South Carolina Forestry Commission

This report summarizes a study conducted by the South Carolina Forestry Commission on this Latin-American market during the first half of 2017 and is intended to help the U.S. southern states' forest products sector (producers, manufacturers, traders and policy-makers) in examining and preparing for the opportunities this market may offer, by providing them with detailed information on Costa Rica's economics, forest products trade and international contacts. This document should be used as a reference, and in conjunction with primary market information from key forestry organizations, to help formulate strategies to participate in the Costa Rican market. The South Carolina Forestry Commission will not be held liable for misuse or misinterpretation of information within this document.

FOREST PRODUCTS SOUTH CAROLINA

INTRODUCTION

The Central American region has been observing increases in population, tourism and deforestation, which together are driving a greater need for imported forest products in general, and solid wood products in particular. Nevertheless, the South's share of this market is relatively low, and work is yet to be done to explore its potential and promote local products. Costa Rica, the major solid wood products importer in the region (28.0% of Central American imports), has increased the total value of its imports from $32.1 million in 2006 to $79.0 million in 2015. Between 2011 and 2015, most products in this category coming to the country corresponded to wood lumber, followed in importance by pallets and plywood. Most of this lumber consisted of coniferous species. The country's main solid wood products trading partner during this period was Chile, which accounted for almost 43% of all imports, whereas the Netherlands, China and USA accounted for 14.4%, 11.0% and 5.7%, respectively.

Despite advantages such as geographical proximity, historical records of good business relationships and the ability to maintain reliable supply throughout the year from certified sources, USA's participation in the Costa Rican solid wood market is limited: $4.8 million per year on average between 2011 and 2015. With the information provided in this study at hand, participating agencies expect to create an advantage for local companies to develop new businesses in Central America, while contributing to the state's growth and helping partners fulfill their housing needs and meet their environmental target to become carbon neutral by 2021.

COUNTRY OVERVIEW

Economic factors

This Central American nation represents a market of 4.3 million people [1], located in a land extension of 51.1 thousand Km2 (19.73 thousand mi2) [2] organized in seven provinces, with urban areas concentrating 77% of the total population [3], mostly in the central region of the country. The principal city is San Jose, the capital, where a third of the country's population resides [4] (Figure 1).

Unlike its peers in the region, the absence of military organizations has helped Costa Rica to achieve positive marks on economic development, remarkably higher that the rest of Central American countries, through investment focused on health, education and infrastructure [5]. Despite its small size, this nation has been able to keep its Gross Domestic Product (GDP) increasing (Table 1), reaching growths of 3.7% and 4.3% in 2015 and 2016 respectively [6]. With a GDP per capita of $11,260.1 in 2015, Costa Rica is among the top countries in the Central American region, second only to Panama [7], despite maintaining unemployment rates close to 9% over the last three years [8]. Since the late 80s, the country has pursued economic growth by opening to international trade and economic liberalization [9]: fourteen trade agreements are currently effective with partners such as the U.S., Canada, Mexico and Chile among others; and two more are on the negotiation table (South Korea and the Pacific Alliance) [10]. Another fourteen bilateral investment agreements are also in place.

Today's economic activity takes place mainly in the manufacturing and commerce sectors, along with exports of services and tourism [11], the latter two being greatly benefited by direct foreign investment, from the United States in particular [12]. Thanks to a history of single digit inflation over the last decade –with a notable minimum of 0.77% on 2016 [13], the country has moved to minimize its Central Bank's intervention on the handling of its rate of exchange with the U.S. dollar (USD) through a "Managed Float Regime" (i.e. only when excessive fluctuations appear), which on average stood at 551.07 Costa Rica Colon (CRC) per USD over 2016 [14].

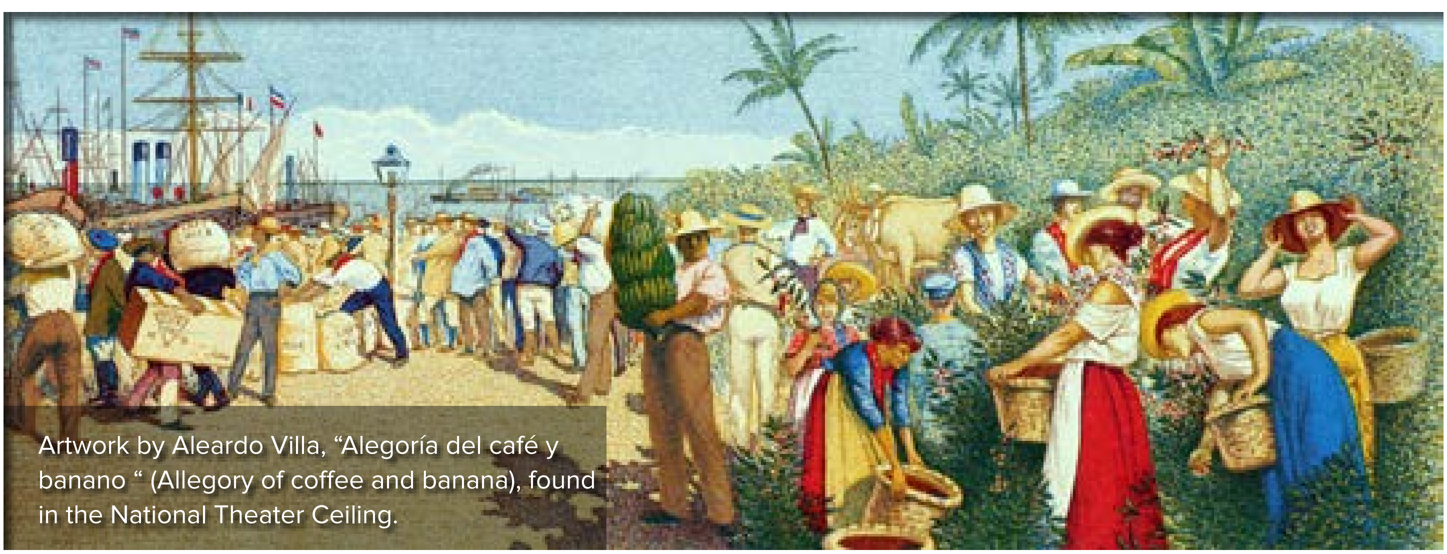
FOREST PROFILE

Forest cover

Nowadays, Costa Rica's forest cover constitutes practically half (52.4%) of its land extension [15], almost equally divided in private forest and the National System of Conservation Areas (public) [16].

However, in the late eighties, increasing demand for forest products due to a growing population, fast agricultural development and minimal forestry regulations decimated the country's forest cover to a historical low of 21.0% [17], [18].

Forestry legislation was promulgated in 1996 with the purpose of preserving forest cover, also positioning the country at the "forefront internationally in its efforts to stem deforestation, preserve wild lands, and promote sustainable forestry" [19].



Artwork by Aleardo Villa, "Alegoría del café y banano " (Allegory of coffee and banana), found in the National Theater Ceiling.

Figure 1. Political Map of Costa Rica

Critics of this law argue that it has neglected the creation of incentives for sustainable forestry on private-own lands [19]: new and stricter controls on land use combined with increasing land costs and a shift from a "reforestation bonus" approach to a program of "Payment of Environmental Services" –introduced also with the new legislation, along with competition from other agricultural commodities limited the economic feasibility of forest plantations [16]. These conditions have gradually discouraged reforestation for commercial purposes, therefore decreasing trees plantations and wood availability and creating a deficit in supply needed to be subsided with imports[20]. As of 2013, activities from the solid wood products sector accounted for only 0.42% of the national GDP in 2013 [21].

End-use markets[1]

Economic activity in the Costa Rican solid wood products industry (HTS2 Code 44) revolves around three main sectors: construction, furniture and pallet manufacturing [16].

According to the country's National Forestry Office, 25.4% of the wood processed from domestic sources in 2015 was utilized on construction, 10.2% on furniture and 42.1% on pallet manufacturing (mostly for export of produce) [21].

Exports and other applications accounted for 20.6% and 1.7% respectively [21]. In construction, 42.0% of the wood is used for structural applications, 23.4% on mouldings and wooden ceilings, and 34.6% on concrete formwork [21]

Compared to American construction systems, Costa Rican builders' use of wood is less intensive, favoring concrete in high-, medium- and low-value construction markets. The country's commitment to become carbon neutral by 2021 has prompted efforts from the local government, academia and industry to promote the use of wood in construction, which in turn would increase the need for imports.

Exports of forest products from Costa Rica have remained focused on two main sectors over the last two decades: paper and paperboard products (HTS 48) and solid wood products (HTS 44). Since 2012, exports of the former have accounted for 50.1% of the total value for all forest products.

In second place, exports of solid wood products represented 36.3% the same period [22]. Most exports of paper and paperboard products go to El Salvador, the United States, Guatemala, Nicaragua and Panama. Exporters of solid wood products on the other hand, find most of their customers in the US, India and Singapore. Most of the lumber goes to Singapore and India, whereas pallets end up in the US and Panama.

Table 1. Costa Rica's Economic Data

Indicator	Description	2010	2011	2012	2013	2014	2015
GDP	Billion 2010 USD	37.3	38.9	40.7	41.6	42.8	44.4
GDP Growth	Annual %	5.0	4.3	4.8	2.0	3.0	3.7
GDP / Capita	Thousand USD	8,199 .0	9,187.0	9,985 .0	10,547 .0	10,545 .0	11,260 .0
Exchange Rate	CRC / USD	529.4	529.4	529.4	529.4	529.4	529.4
Inflation	Based on 2006	5.82	4.74	4.55	3.68	5.13	-0.81
Population Growth	Annual %	1.26	1.21	1.16	1.12	1.08	1.05

Sources: The World Bank, Central Bank of Costa Rica

Costa Rica's forest products export

The average forest products exports from Costa Rica since 2012 amounted to $195.6 million per year, with a maximum of $204 million in 2016. Over this period, exports have remained as fraction of the value of imports, 25% on average.

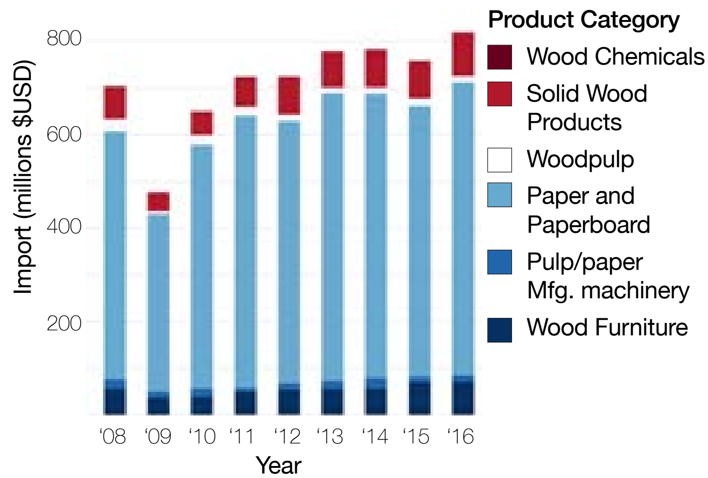
Exports of forest products from Costa Rica have remained focused on two main sectors over the last two decades: paper, paperboard and solid wood products. Since 2012 for instance, products within HTS Chapter 48 have accounted for 50.1% of the value of all forest products sector from this country. In second place, exports of solid wood products have represented 36.3% of the same. Most exports of paper and paperboard products go to El Salvador, the US, Guatemala, Nicaragua and Panama. Exporters of solid wood products on the other hand, find most of their customers at the US, India and Singapore. Starting in 2002, logs started gaining more relevance within the latter category, accounting for 63.2% of its value in 2012. However, at that point, demand of this commodity started to yield in favor of pallets (HTS 4415) and lumber. Most of the lumber goes to Singapore and India, whereas exported pallets end in the US and Panama.

IMPORTS[3]

Historically, the bulk of wood products imported into Costa Rica have consisted of paper and paperboard products, solid wood products and wood furniture. This country has observed a sustained increase in imports of forest products for more than two decades, moving from $230- $290 million in the mid-1990s, to almost three quarters of a billion in 2015.

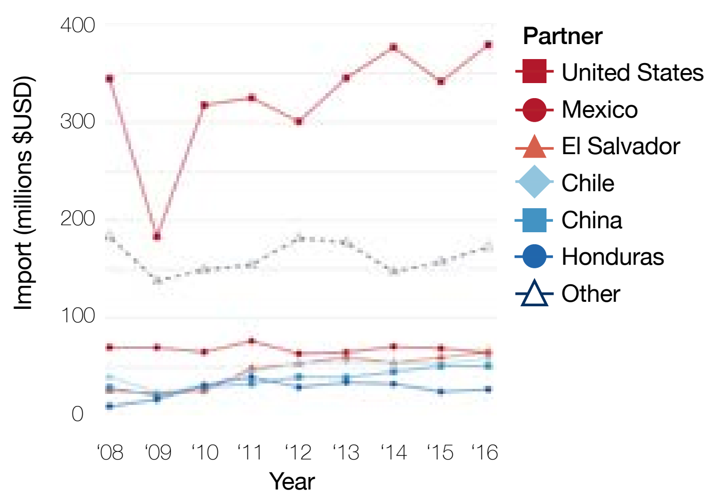
According to the Costa Rican Foreign Trade Promotion Agency (PROCOMER), Costa Rica imported $819.0 million in 2016 (preliminary figure). This represents an increase of 8% ($61.2 million) from 2015, which aligns with a positive trend observed in the last seven years. The mix of imported wood commodities in 2016 consisted of 76.5% ($626.6 million) of paper and paperboard products (HTS 48), 11.3% ($92.5 million) of solid wood products (HTS 44), and 8.7% ($71.5 million) of wood furniture (HTS 94[4]). Figure 2 depicts the distribution of C.R.'s forest products imports by commodity group, which also includes wood-based chemicals (HTS 38), woodpulp (HTS 47) and machinery or equipment used for the manufacture of pulp and paper products (HTS 84).

Figure 2. Costa Rica's Forest Products Import By Commodity Group



Between 2011 and 2015, almost 80% of all forest products imports into Costa Rica have originated from 6 countries (Figure 3). Over this period, the U.S. has clearly been the major partner by driving 45.1% of the total value traded. Mexico, El Salvador and Chile followed with exports into Costa Rica that represented 9.0%, 7.5% and 7.0% of the country's total respectively.

Figure 3. Costa Rica's Forest Products Import By Country



Paper and paperboard products

The country's demand for paper and paperboard products has positioned this sector at the top of the market for imported wood-fiber goods.

Imports of almost half a billion USD in 2015 ($579.6 million) represented around three quarters (76.5%) of all forest products imported by Costa Rica that year, half of which (51.6%) was supplied by US firms (Figure 4). Paper mills in Mexico and El Salvador accounted for 11.3%

Figure 4. Costa Rica's Forest Products Import By Product Category and Partner (2016)

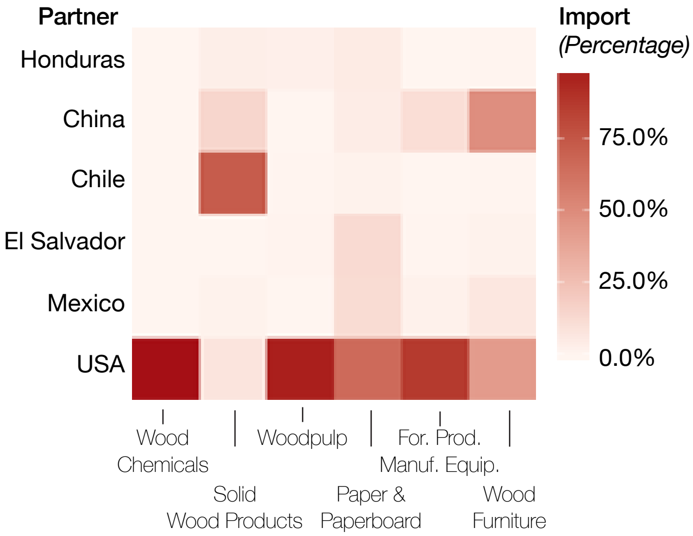
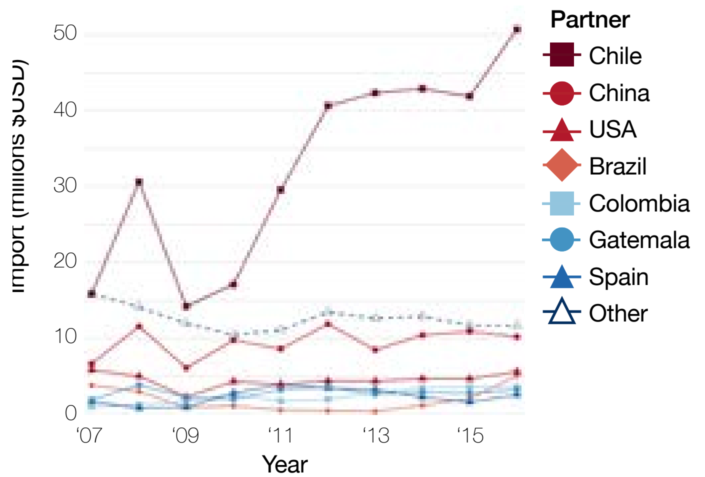


Figure 5. Costa Rica's Solid Wood Products Import By Country



and 10.1% respectively of the total that year. The mix of paper and paperboard products consumed by the Costa Rican market is highly varied –twenty-two commodities since 2011, however those with greater demand in 2015 were: uncoated paper, sanitary paper and Kraft paper, each accounting for 28.5%, 12.7% and 11.2%, totaling 52.4% of the sector's imports that year.

Solid wood products

This category encompasses a wide variety of commodities, ranging from primary products such as logs, lumber and veneers, to higher-value-added items such as pallets and engineered panels (e.g. plywood, fiberboard and particleboard).

Second in importance after paper and paperboard products, the country has observed a steady increase of imports of solid wood products over the last 22 years, follow by a dramatic post-crisis recovery from $28.8 million in 2006 to $79.0 million in 2015. With a market share of 53.5% over the last decade, Chile has become the country's top solid wood products supplier, thanks to its dominance on the lumber and fiberboard sectors (Figure 5). This South American nation is distantly followed by China and the US, with respective market shares of 12.7% and 5.8%. Other key partners worth or mention are Brazil, Colombia and Guatemala.

In light of the total value of wood imported since between 2011 and 2016, it becomes evident the weight lumber has on trade, along with plywood, fiberboard and particleboard. Throughout this period, lumber accounted for 46.5% of all solid wood products imports into Costa Rica, 98.5% of which were coniferous species (Figure 6, Table 2). Most of this corresponded to radiata pine and to a lesser degree, southern yellow pine, both mostly used in construction applications [23].

Chile's share of this market amounted to a noticeable 94.5%, facing minor competition from U.S. and Brazil with respective market shares of 2.9% and 1.3%. According to interviewed sawmills and lumber distributors, builders recognize the value of southern yellow pine's (treated and non-tread) structural properties and have found its price to be competitive in the local market, however inconsistency in supply have discouraged them in from using it in the

Baby turtle on the beach, Caribbean coast, Costa Rica past. Furniture manufacturing is another top market for imported softwood lumber (and wood panels). Firms in this sector seem to favor radiata pine over southern yellow pine due to latter's tendency to saturate sanding paper with its resin, making the process difficult. Higher-value furniture makers have had positive experiences with white pine species in the past and expressed their interest in developing a market.

Figure 6. Costa Rica's Solid Wood Products Import By Commodity Group

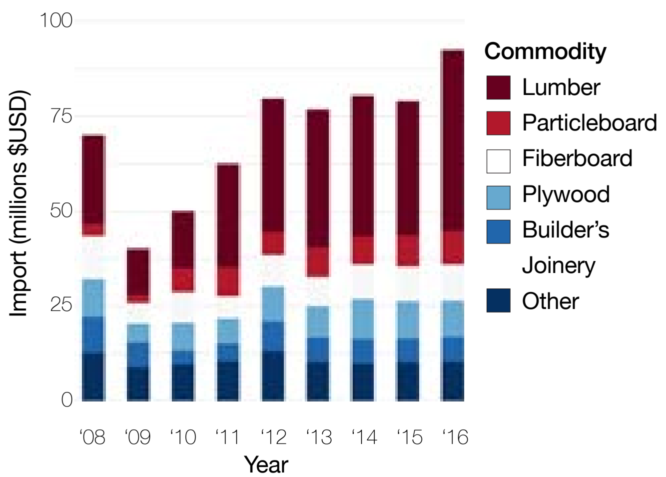
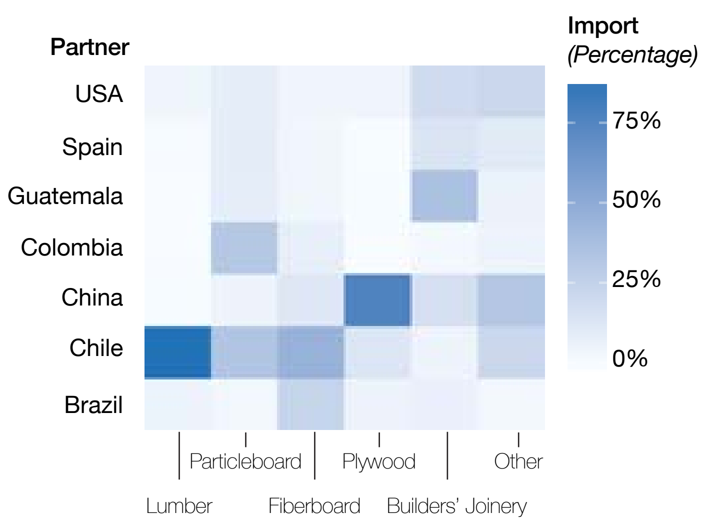


Figure 7. Costa Rica's Solid Wood Products Import By Product Category and Partner (2016)



Next in the product mix, imports of plywood, fiberboard and particleboard, amounted to $9.6, $9.5 and $8.9 million respectively in 2016. Costa Rica's major provider of plywood (HTS 4412) between 2011 and 2016 was China: this country accounted for 61.8% of all imports. Honduras and Chile followed suit with 11.3% and 9.1% during this period. Fiberboard imports are mainly from Chile, which provided 40.6% of all CR imports between 2011 and 2016. Those from China, Austria and Brazil corresponded 9.2% 9.1% and 8.6% (Figure 7). Interviews with local firms point to a growing interest in fiberboard for low-value furniture applications, but they also confirm their lack of knowledge on its technical properties and grading system.

Wood furniture

Furniture is another sector showing a remarkable growth over the last 10 years, increasing its size from $44.4 million in 2007 to $71.5 million, thanks to demand coming from three sectors: wooden seats (HTS 9401), furniture parts (HTS 9403) and prefabricated buildings (HTS 9406[5]), which in 2016 represented 47.6%, 42.2% and 10.2% of the sector's imports respectively.

In general, most of the wood furniture imports into Costa Rica come from China, the US, Italy and Canada, which together accounted for 70.7% of the value of all imports in 2016 (26.6%, 23.4%, 5.0% and 4.5% respectively). Interviews conducted among local companies pointed to prefabricated buildings as a business opportunity in the country: government, industry and academia share an interest in using more wood in construction, particularly for government-sponsored projects: schools, low-income housing, and multipurpose recreation centers, among others.

US EXPORTS INTO COSTA RICA[6]

From a broad perspective, the US is Costa Rica's major supplier of forest products, mainly due to its participation in the paper and paperboard products market. Trade levels

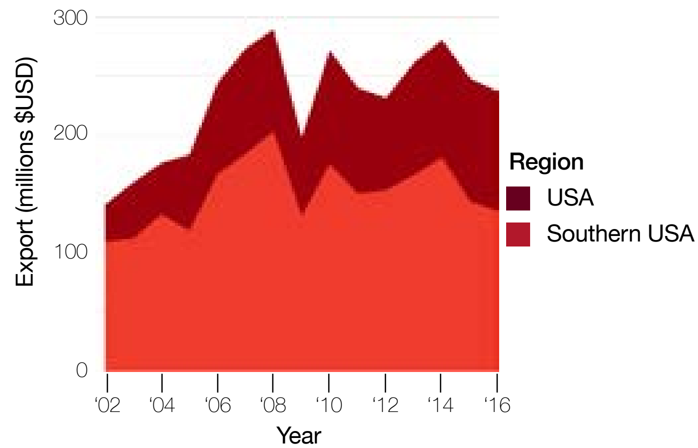
Table 2. Costa Rica's Solid Wood Products Import by Commodity Group (Millions USD)

Commodity	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Lumber	18.8	23.46	12.16	14.98	27.25	35.32	36.35	37.14	35.33	47.71
Particleboard	4.14	3.09	2.17	6.28	7.67	5.93	7.77	7.39	8.27	8.86
Fiberboard	8.39	11.39	5.45	8.1	5.86	8.26	7.75	9.16	9.18	9.57
Plywood	5.31	10.03	4.94	7.43	6.72	9.21	8.2	10.53	9.84	9.47
Builder's Joinery	5.49	9.41	6.54	3.51	4.55	7.91	6.49	6.43	6.19	6.53
Other	10.41	12.72	8.9	9.69	10.49	13.08	10.29	9.88	10.23	10.41

have remained around $252.4 million per year over the last decade, reaching $236.8 million in 2016 (Figure 8).

This last year, exports of paper and paperboard products accounted for 82.3% of all forest products sold by the US to Costa Rica. Second and third in importance were wood furniture and woodpulp, which accounted for 7.8% and 5.1% the same year respectively. Despite the existence of a free trade agreement with Costa Rica, the U.S. remains as a minor supplier of solid wood products: in the last 15 years, the value of exports of this commodity group has averaged $6.7 million per year –with a couple of peaks in 2008 and 2010 of $12.7 and $14.1 million respectively; which translated into an average of 2.93% of the total US forest products exports into Costa Rica per year, over these 15 years.

Figure 8. US Forest Products Export to Costa Rica (Total vs. Southern US)



U.S. southern states' export to Costa Rica

Historically, the Southern United States have accounted for the majority of the country's forest products exports into Costa Rica. Between 2010 and 2016, combined shipments from the 13 U.S. Southern states represented 62.5% of the value of forest products delivered to the Central American nation, which corresponded to an average of $158.1 million per year (Figure 8).

Over this period, 84.4% of all exports from the American South came from three states: Georgia, Florida and Mississippi (Figures 9a and 9b), explained mostly due to their strong participation on wood pulp, paper and paperboard products exports. Georgia's shipments alone accounted for 40.6% of the total, whereas Florida and Mississippi did so for 26.1% and 17.6% respectively.

The mix of forest products imported by Costa Rica from these states is similar than that observed on the rest of the country.

Paper and paperboard products usually account for 80% to 90% of exports into the Central American nation, whereas those of woodpulp and wood furniture represent 7.5% and 4.6% of the same respectively (Figure 10). As it was also noted for the American forest products industry, exports of solid wood products into Costa Rica are relatively low, despite geographical proximity, free trade agreements currently into force: between 2011 and 2016, this region exported only $3.3 million per year on average, which represented just 2.2% of the total value traded; most of which corresponded to lumber (of coniferous species), logs, particleboard and fiberboard. Most solid wood products exports from this region into Costa Rica came from Florida (45.6%), Georgia (20.7%) and Alabama (15.0%) throughout the last six years.

Figure 9a. 2010-16 Southern US Forest Products Exports To Costa Rica (State Distribution)

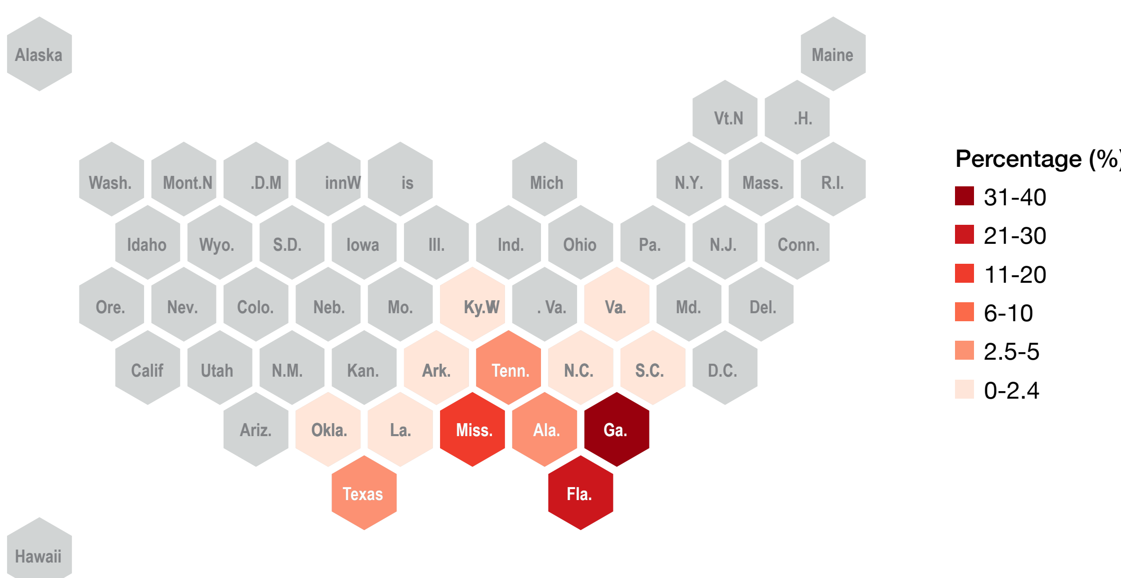
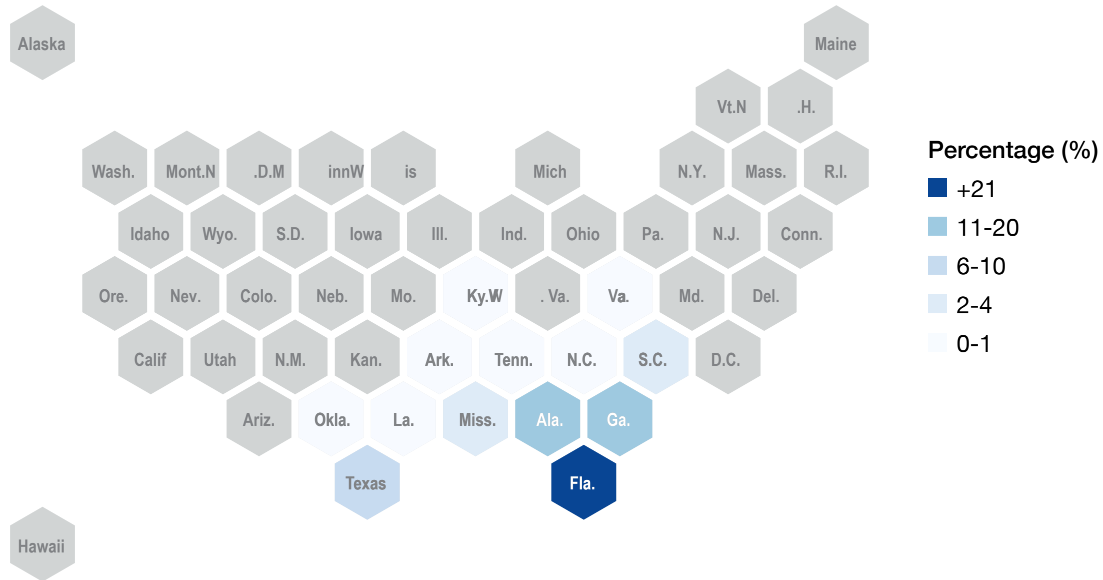


Figure 9b. 2010-16 Southern US Solid Wood Products Exports To Costa Rica (State Distribution)

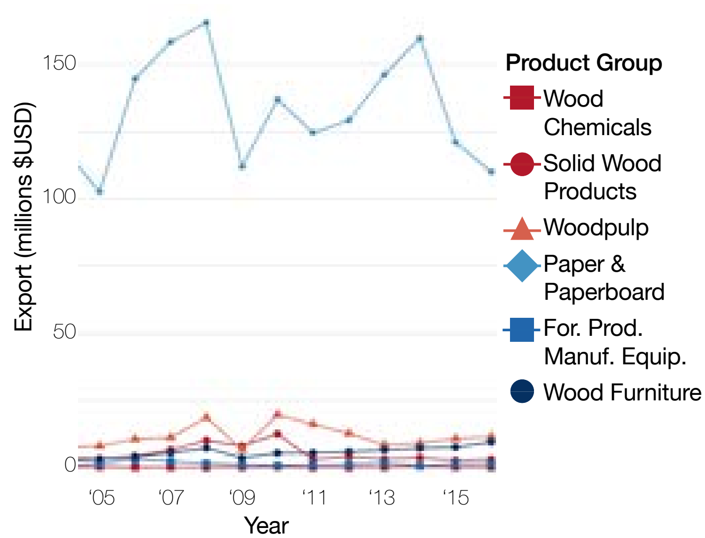


CONCLUSIONS

The present study introduces the Costa Rican forest products market, its opportunities and challenges for potential partners abroad. Expected economic and demographic growth, along with urbanization trends suggest demand for solid forest products will continue to increase in the foreseeable future, expanding the country's need for imports.

Current efforts advocating for more wood in construction may lead to additional market changes, calling for a greater supplier base and technical support from industry organizations. Education and training on US forest products will remain as a determining factor in promoting their use in the central American country. Feedback from the local industry also reiterate that is necessary further work to develop markets for key commodities such as yellow and white pine lumber, wood panels and prefabricated buildings).

Figure 10. Southern US Forest Products Export Into Costa Rica



1 Naming convention used for commodities in this document is based on the Harmonized Tariff Schedule of the United States (29th Edition)
2 HTS Code: Harmonized Tariff Schedule Code
3 Trade data discussed in this section are based on PROCOMER's statistical database, unless otherwise noted
4 HTS 94: figure only includes wood furniture items.
5 Due to limitations on statistical data available, imports of non-wood prefabricated items are also capture in this figure.
6 Trade data discussed in this section are based on US Census Bureau's "USA Trade Online" statistical database, unless otherwise noted
7 Averages over the last 6 years

Figure 11. Forest Products: Commodities and Groups

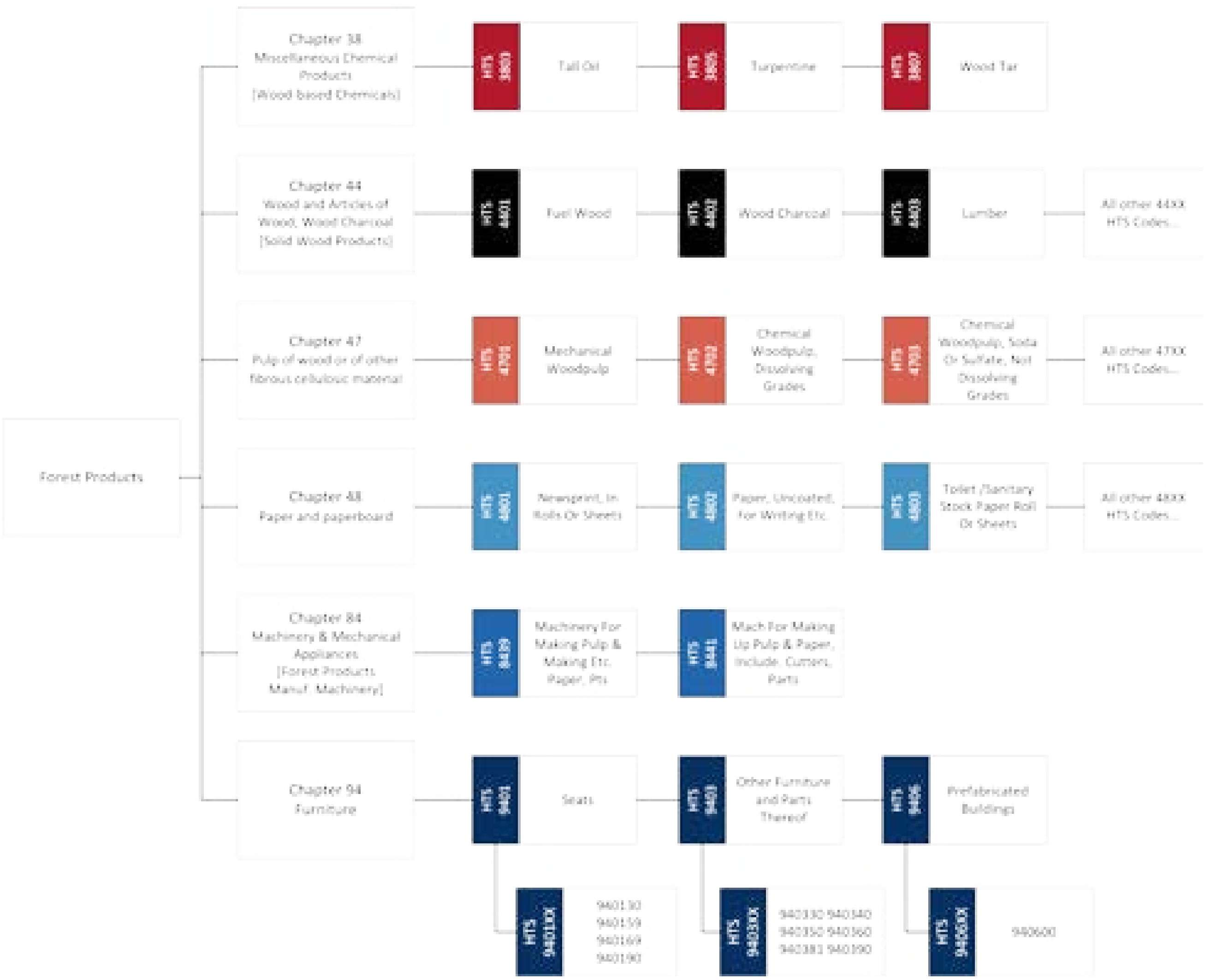


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Table 3. Selected Industry Contacts

Company: Mexichem (Amanco)
Sector: Construction Materials Distributor
Contact: Corrales, Eddy
Email: eddy.corrales@mexichem.com
Phone Number: (506) 8381 4746

Company: Mayoreo del Istmo
Sector: Construction Materials Distributor
Contact: Cruz, Verny
Email: vcruzmolina@gmail.com
Phone Number: (506) 8855 7385

Company: Forestales Latinoamericanos
Sector: Wood Distributor
Contact: Jimenez, Ronny
Email: ronnyjimenez@forestaleslatinoamericanos.com
Phone Number: (506) 2272 4448

Company: Maderas Cultivadas CR
Sector: Wood Distributor
Contact: Lopez, Giovanny
Email: glventas@maderascultivadas.com
Phone Number: (506) 8706 7818

Company: Maderas Kodiak
Sector: Wood Distributor
Contact: Webb, Alfred
Email: web@maderaskodiak.com
Phone Number: (506) 8704 4235

Company: El Cipresal
Sector: Construction Materials Distributor
Contact: Meneses, Dora
Email: dmeneses@elcipresal.com
Phone Number: (506)2551 2497

South Carolina Forestry Commission

PROJECT INFORMATION

PROGRAM: LANDSCAPE SCALE RESTORATION

Funding Agencies

The US Department of Agriculture and US Forest Service

Funding Year

2016

Title

Mapping Path to Growth for U.S. Southeastern Forest Products

Forest Service Region

USDA Forest Service - R8

Description

The existence of adequate markets, local and international, to sell forest products is a key barrier to private non-industrial forest landowners exercising sound forest management on their land. Without adequate markets and a favorable return on their timber investment, landowners will not reinvest in establishing quality, well-stocked stands for future timber resources. Markets created through forest products industrial development and export development create jobs and reduce the trade deficit. The goal of this project is to develop current and new international markets for the Southern US forest resources by delivering a series of reports profiling the top international markets for forest products. Information presented in this marketing report is based on original research (interviews and site visits), as well as on secondary sources.

Goals

1. Assist the southeastern region of the U.S. in identifying opportunities to increase exports of forest products in current and new markets, which in turn will help the industry grow and create new jobs. Through this project, companies, government agencies and trade associations will have access to valuable marketing intelligence, relevant in developing new businesses, customers, products and services.
2. Raise the industry's awareness of key aspects involved in international trade: such as logis tics, financing, environmental certifications, as well as providing insights on wellestablished and emerging markets.

SC MARKETING

This study was conducted by the Resource Development Division at the South Carolina Forestry Commision, in partnership with particpating agencies at the Southern Group of State Foresters: Florida Forest Service, VA Department of Forestry, GA Forestry Commission, KY Division of Forestry, NC Forest Service, TN Dept of Ag. - Div. of Forestry.

South Carolina Forestry Commission

FOREST PRODUCTS SOUTH CAROLINA

Tim Adams
Resource Development Director
P.O. Box 21707
Columbia, SC 29221
Office: (803) 896-8802
Fax: (803) 798-8097
Email: tadams@scfc.gov
Web: trees.sc.gov

Edgar Arias
Forest Products Marketing Specialist
P.O. Box 21707
Columbia, SC 29221
Office: (803) 896-8833
Fax: (803) 798-8097
Email: earias@scfc.gov
Web: trees.sc.gov